



Town of Chatham

Office of the Selectmen

Town Manager

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Chatham, MA 02633



Jill R. Goldsmith
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*2018 Annual Performance Evaluation of Town Manager Jill R. Goldsmith
Presented by Board of Selectmen Chairman Dean P. Nicastro
May 6, 2019*

In each year since her hire in 2011, the Town Manager has been evaluated annually with a Performance Evaluation instrument developed collaboratively by the Board of Selectmen and the Town Manager. To assist the Board in preparing the evaluation, Town Manager Jill R. Goldsmith provided a summary of her accomplishments and activities occurring in the 2018 review period.

Under the Board-approved methodology, Ms. Goldsmith's performance was evaluated on six general managerial categories:

- 1) Personal/Professional
- 2) Board Support/Relations
- 3) Financial Management
- 4) Personnel Management/Organizational Leadership
- 5) Community Leadership/Public Relations
- 6) Town Operations/Infrastructure

Participating Selectmen then awarded "performance points" based on a total of 38 different sub-categories, using a 4-point rating scale for each:

- 4 points = Excellent/Highly Commendable
- 3 points = Strong Performance
- 2 points = Satisfactory/Acceptable
- 1 point = Improvement Needed
- N/O = Not Observed

Based on this point system, Ms. Goldsmith was awarded a composite score of **3.89**. This compares to Ms. Goldsmith's previous composite score of 3.64 from last year, and indicates strong collective praise from the Selectmen for her ongoing high performance and excellent managerial skills. She continues to rank in the scoring range of Strong Performance to Excellent/Highly Commendable, mostly in the latter.

It is noteworthy that Ms. Goldsmith received "perfect" 4.0 scores in 23 of the 38 sub-categories, and received highly respectable composite scores of 3.60 to 3.80 in an additional 14

sub-categories. In only one sub-category was there a lower composite score of 3.40, still in the range of Strong Performance.

2018 BOS Comments Town Manager Performance Evaluation

In addition to the metric measurements cited above, individual selectmen were also encouraged to provide their own written comments and make personal observations regarding Ms. Goldsmith's performance in the past year. Selectmen also were provided the opportunity to meet with, or speak with, Ms. Goldsmith in connection with their individual evaluations. The following comments were provided, according to category:

1. *Personal/Professional*

The Town Manager continues to approach her job responsibilities in a most ethical and professional manner, and to interact respectfully and competently with Town officials, staff and the public. She remains a credit to the Town.

The Town Manager has made great improvements in balancing the day to day duties of the position with the ever evolving list of issues which face the Town. The Town Manager is accessible to both staff and the public.

Jill is unquestionably a person of integrity and honesty. Recertified as a credentialed City/Town Manager by ICMA. She deals with complex challenges with seasoned, experienced approaches and is not afraid to be creative, e.g. affordable housing initiatives using private, public partnership.

Jill possess impeccable integrity.

2. *Board Support/Relations*

The Town Manager provides very capable and detailed support to the Board for its decision-making and for carrying out its agenda; she is also most willing and available to discuss issues/concerns with individual Board members.

The Town Manager and the Board maintain a professional working relationship. Communication with the Board Chair and full Board is strong.

Always a professional. Jill is always available and takes time to work directly with Board members. She will explain and recommend options for Board decisions. Always implements Board decisions.

Excellent relationship with the Board.

In an example of a Selectman's concerns, the Town Manager addressed the concern; immediately reached out to relevant parties and coordinated effective communication and ultimately appointments/recommendations that were in keeping with core community values to a State level initiative. I would like to see the Town Manager be more vocal at

Board meetings on items discussed. An inclusionary conversation/debate helps us to better understand Board actions in relation to Town/staff/department impacts.

3. *Financial Management*

This remains among the strongest areas of the Town Manager's considerable accomplishment; the Town Manager continues to work effectively with the Board, Finance Committee, the school authorities and the Finance Director to protect and enhance the Town's financial strength.

The Town Manager works hard to maintain the Town's strong financial condition. Clearly a strength of the Town Manager.

Chatham financial management is outstanding. Detailed budget proposals are clear and easily understood. Budgets and their implementation are worked with staff and are fed to the Board. Staff inputs recognized, and budget priorities identified. Transparent process. Results: low tax rate maintained, AAA bond rating, capital prioritization, monthly status on actual vs. budgets.

Excellent financial management. Would like to see further maturation and use of the template for capital decision-making and planning from Collins Center initiative.

The Town Manager should be applauded (along with Finance Director) for our continued fiscal condition and bond rating; in the coming year there may be a challenge to the need for additional staffing. I have confidence that the Town Manager will address this in a thoughtful and strategic manner.

4. *Personnel Management/Organizational Leadership*

The Town Manager's quality hiring choices over the recent period have enhanced the ability of Town staff to provide services to the townspeople and to guide Board and committee volunteers through their work.

Concerns for the transition/succession planning of some of our long-time staff. Room for improvement with the communication of the various boards/committees, staff and Town Manager. Need to continue to maintain/improve staff morale between the two different generations of employees working for the Town.

Chatham and Cape Cod are a challenge to recruiting and retaining quality personnel. Jill is actively engaged with all employees, meeting weekly with Department Heads and biweekly at staff locations. Praises in public and provides constructive improvement in private. Always looking to improve the organization, a wage and classification plan is being developed.

Jill has done a good job re: building her staff. Ex.: Finance and the DPW. Good job with difficult negotiations with unions.

Staff retention has been a challenge in past years, recruitment a challenge as well because of cost of living and housing. The Town Manager has been able to find and retain good, creative, knowledgeable employees. The challenge has been workload and the Town Manager needs to be vocal with the Board to address those concerns when it is relevant to Board directives and let us know a strategic plan for department employee increases coming forward.

5. *Community Leadership/Public Relations*

The Town Manager projects a positive and upbeat message to the citizenry. Would suggest that she could take on a somewhat more prominent role in advancing the Board's agenda, both at Board meetings and in the public venue generally.

The Town Manager is both visible and approachable. The Town Manager represents the interest of the Town in a positive and professional manner.

Jill is visible and approachable throughout the community and participates as a leader and worker in community groups. She is always positive, patient and approachable, even when negatively confronted. Her calm demeanor belies an active and questioning approach to understand all opinions. She is recognized as a leader among her peers and elected State officials.

Jill is active locally and at the State level. She outperforms in this area!

The Town Manager's work with the Chamber of Commerce has in effect created better communication opportunities for Town projects and other information.

6. *Town Operations and Infrastructure*

Overall, Town services/infrastructure are very well overseen/managed/delivered under the Town Manager's leadership; recent capital budget process revamp is a significant plus.

Greatly appreciate the monthly Town Manager Report which provides a recap of the Town's operations.

I see a team approach among the Town staff to implement Town programs and services within budget guidelines and Board goals. Meets regularly with staff and encourages coordination to enhance municipal services. Technology is being incorporated as financially responsible to reach the entire community. A well-run Town that understands its needs to continually improve.

Good job on adoption of technology. Need to focus on continued improvements in service delivery. Would like to see deeper scrutiny of costs of projects before Board presentation(s).

The E-cars have been a great addition to the Town, showing forward thinking on green initiatives. The use of social media technology would enhance services communication.

Conclusion: In the collective judgment of the five selectmen, the Town Manager has overall performed her job responsibilities at the highest level of achievement. She is a consummate professional, who works well with the Board and serves the town's best interests. The Town of Chatham is most fortunate to have Jill R. Goldsmith as our Town Manager.



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MEMORANDUM

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TO: Honorable Board of Selectmen

FROM: Jill R. Goldsmith, Town Manager

DATE: April 8, 2019

SUBJECT: Town Manager Performance Evaluation #7 Transmittal–
Fiscal Year 2019 - Calendar Year 2018

To begin, I wanted to again express my sincere appreciation to the Board of Selectmen (BOS) for the action on November 19, 2018 to approve my second successor employment agreement for the period of July 1, 2019 through June 30, 2023. I greatly appreciate this vote of confidence in my abilities as Town Manager as well as my commitment to this wonderful community.

To assist the BOS in preparing the evaluation, I wanted to share with you some of the accomplishments and activities that have occurred in the review period driven by your goals as well as my day-to-day core Town management duties for our municipal corporation with a \$55M omnibus budget and 132 full-time employees. I have also included a preview of the Town Manager's and BOS 2018 Annual Town Reports.

The accomplishments of our administration are the result a strong partnership with Town Officials, the hard work of Town employees, and the diligence and commitment of my management team. The ability of this team to work together to continuously strive to improve our processes and services, shift gears for required responsiveness, proactively work to identify issues, and provide our citizenry with the programs and services expected is both impressive and critical to achieve the goals set by the Board as well as maintain our organizational culture. I am proud of the team we have built, community partnerships, and maintaining a sense of community over the past seven years.

Building on initiatives since August 2011, I have worked to be a high energy, communicative and compassionate leader who seeks to balance progressive initiatives with our traditional community values. In 2018 this commitment continued. Much of my efforts are behind the scenes, but outcomes reflect high expectations for performance, transparency, and

accountability. Below are highlights of my activities as Town Manager with more details in the 2018 Annual Reports.

Personal/Professional

- Work to remain accessible and available 24/7 in both my role as Town Manager and resident
- Commitment to continued professional development; ICMA Credentialed Manager in 2016 and annual recertification- (40 hours of professional development per year);
- Leadership roles on Statewide Committees -
 - Joint Labor Management Committee serving three Governors, and Management Chairman since 2012
 - MA Municipal Association – Committee on Manager/Police Chief Relations, Chairman
 - League of Women in Government; Founding Member of MA Affiliate in 2017
 - MA Shellfish Initiative – Town Manager member 2018
- Excellent relationships with local, state, and federal legislators and administrations. Many call/email or text on a regular basis to check in on Chatham's needs or initiatives

Board Support/Relations

- No appointment needed; walk-ins encouraged
- Continuing efforts to improve BOS agenda reports, meeting packets, and follow-up
- Communications to/from BOS shared in an effort to keep the BOS similarly informed and employees connected to our policy makers
- Board included on Chatham everyone (.gov) emails and Community events e-calendared

Financial Management

With a priority for financial prudence and efficient direction of resources to maintain a stable tax rate:

- Implementation of initiatives approved by Town Meeting - Capital Bond Article - \$11.3M; Waterways User Fee (WUF) Revolving Fund; IMA with Harwich funds; Property Acquisitions
- Maintain and improve bond rating – comprehensive review of budget and financial policies; OPEB funding obligations
- Collective bargaining cost containments since 2013- \$200,000 in savings in health insurance premium cost sharing in FY2019, limited buy-out liabilities
- Senior Tax Work-off Program – initiated at my recommendation in 2012 when the previously (2010) approved debt -excluded projects repayment hit the tax rate in 2012 – continues to flourish

Personnel Management/Organizational Leadership

- Improved employee turn-over due to separation versus retirement. Continued efforts to recruit/hire quality Chatham and Cape based employees

- Encouraging Departments to collaborate - COA/Public Safety/Health/Elder Services Team; Emergency Management Team
- Regular meetings with staff, enhancing performance evaluations and training

Community Leadership/Public Relations

- Attendance at Chamber of Commerce, Community social events and fundraisers
- Awards – MA Municipal Association
- Channel 18 shows – ATM Warrant Preview
- Citizen Academy - Fire and Police departments
- Community Forums on Policing and Race Relations
- Meals on Wheels Delivery in March – National Program for Mayors or City Managers

Please also refer to the attached 2018 Annual Reports for more details.

Town Operations and Infrastructure:

As you are well aware, early in my first appointment, I began providing a compilation monthly report to the BOS which is also published on the Town's website. Much is guided by the BOS commitment to the annual goals and objectives process, Committee and Board priorities, proactive best practices, and outputs/responses to the welcome demands of the public. Additionally, I continue to fine-tune leadership efforts in line with BOS priorities to retain a strategic focus and organizational culture established by the BOS; communications via regular weekly Department Head meetings, bi-weekly meetings with off-site Department Heads and staff, and an open door policy for BOS, employees, citizens, and visitors. I also continue to devote much time and effort behind the scenes to coach staff as we manage many priorities – from staff liaison activities to the 40+ Boards/Committees to presentation of weekly BOS agenda staff reports to ensure the BOS has the information and resources necessary to contemplate any action, and complete core functions.

In 2018, I continued to focus on identifying reforms and developing strategies to enhance the delivery of services, maximize resources, and strengthen operations at all levels of the organization. In partnership with the BOS, many strategic planning initiatives came to fruition – see attached BOS 2018 Report. I continued to focus on Budget Summits as initiated in 2012; cost-containment/return on the Implementation of health insurance reforms/tiered benefits; completion of land acquisitions as voted by the Town Meeting; roadway infrastructure projects; and advocacy for the Town's position on HR183 locally and in Washington DC with bi-partisan letters of support for legislation. In addition, we worked to respond to citizen inquiries and numerous public records requests in a timely manner.

The COA facility initiative was a great example of thoughtful strategic planning. Utilizing the key findings and recommendations from the COA's comprehensive Community Needs Assessment, we initiated the COA Space Need Analysis. The firm of Bargmann Hendrie + Archetype, Inc. (bh+a) was engaged to provide a Space Needs Analysis and Program Development Pre-Design Planning for the Council on Aging. Working sessions with Town

leaders and community stakeholders were held to receive input throughout the process to formulate a presentation/recommendation to the BOS for next steps. Some of our other stakeholder initiatives related to waterfront infrastructure resulted in a potential price tag more than estimates. While politically difficult, the preliminary results identified strengths and weakness with our master planning process and for a Board objective on a better process for evaluating and prioritization of capital projects.

Other infrastructure highlights relate to our focus on water consumption/conservation and recommendations to the BOS as Water/Sewer Commissioners and the Water Treatment project completed in early 2019.

Financial Management:

The fiscal condition of the Town remains stable due to conservative budgeting, multi-year forecasts, and the review/implementation of reforms which result in savings and efficiencies. The economic outlook included in the Town Manager's budget message illustrates activities of a coordinated department permit review and a component of the Town's increased valuation in 2018 – with a tax rate of \$4.85 per thousand, down from \$4.87 in 2017.

Work is done throughout the year with Department Heads to evaluate and prioritize departmental needs and financial requests recognizing the need to be flexible and adapt to changing situations. As variables arise, such as broken equipment, staff injuries/illnesses/retirements, new regulations or requirements, or storm/weather-related issues, each Department Head keeps me apprised as to the issues and proposed remediation. All department and division heads review budget to actual spending reports on a monthly basis, and are encouraged to review costs/charges for services and continually seek alternate funding sources to augment their programs and services. However, with turn-over in the Treasurer/Collectors office in 2016/2017, much work was taken on by all members of the finance team to improve process and reconciliation in a timely manner. New procedures have been implemented and are working well. The work load is still high, even with on-line payments.

Personnel Management/Organizational Leadership:

Personnel management is not always apparent to the public - or the Board, but my commitment remains to team-building, professional development, and transition/succession planning. Enhanced benefit cost sharing and limitation to employee pay-outs implemented in 2013 for new employees contributing 35% to benefits (legacy employees' share is 30%) has resulted in initial cost containment. As we have seen a turnover in more than 40% of our workforce since 2010 when the State offered Early Retirement- many more expected due to retirement eligibility, I directed our new Human Resources Director in 2017 to proactively plan for such transition and succession planning in collaboration with the Departments. We have seen the benefits since that initiative. Feedback to Department Heads is provided on information received in exit interviews with separated employees, review of operations when a vacancy occurs, and the encouragement of feedback on an ongoing and regular basis is encouraged, in addition to goal setting in annual performance evaluations based on the

adoption of the BOS annual goals. We also have two different generations of employees working for the Town, and all are committed to new workplace requirements that have been implemented. On-going efforts and enhanced attention was committed in 2018 to employee relations, review of administrative procedures, training, and resources for our most important asset. As such, we have seen a stabilization of our workforce in 2018.

I continue to have weekly Department Head meetings to ensure interdepartmental communication and collaboration, but also to provide a forum to preview agenda items or contemplated new practices. I continue to meet bi-weekly with department heads/staff at their off-site locations to remain current on personnel and operational matters – and available if an employee wants to chat with me at their workplace. I remain open to refine administrative procedures with input from any Town employee, and this past year continued to focus on centralized human resources functions and standard practices which was an area that needed refinement. Workload to maintain level services and core functions, including the staffing for Boards, Commissions, and Committees, has been challenging as we are still below the number of employees the Town had in 2010.

To protect the rights of employees under the law and to protect the Town from liability exposure, I have kept the Board apprised of personnel matters to the extent possible within the law. A notebook is maintained in our office (public information) with employment agreements since the initial appointments of the Finance Director, Fire Chief, and Police Chief. Current and previous collective bargaining agreements with the Town's unions are also included, along with the Town Manager Employment Agreements. All contracts/employment agreements are available on the Town's website as well. The BOS is also included on the internal email distribution list.

Professional Development/Community Leadership/Public Relations:

Communications with my peers continues to remain a priority. As a member of the Massachusetts Municipal Managers Association (MMMA) and Cape Cod Managers Association, I attend regular meetings throughout the year in order to stay apprised of pertinent legislative initiatives, best practices and compelling issues of my colleagues. Further, I worked with the MMA to inform the legislature of our needs or any impacts contemplated to the Town. For the past four years I have served as the Management Chairman for the MA Joint Labor-Management Committee (JLMC) for Municipal Police and Fire contract disputes. I was originally appointed in 2006 by the Governor Patrick and reappointed by Governor Baker.

In late 2016, I received certification as a Credentialed Town/City Manager by the International City and County Managers Association (ICMA). The ICMA Voluntary Credentialing Program recognizes professional local government managers qualified by a combination of education and experience, adherence to high standards of integrity, and an assessed commitment to lifelong learning and professional development. I became the 29th credentialed Town Manager/Administrator in MA. In 2018, I continued professional development – 40 hours per year and commitment to a professional development plan for annual recertification.

Collaboration locally continues with our regular Finance Team meetings with the Harwich Town Administration, Monomoy Regional School District Administration and our Town Finance Team including the Finance Director. I am also regularly in communications with State Legislators and I serve on the Lt. Governor's Working Group. We saw a lot of the Lt. Governor in 2018 for our many grant awards! I also have an excellent working relationship with the new Chatham Chamber of Commerce Director who has helped with social media distribution of our events and creation of new public outreach opportunities. I also welcomed the new CBI General Manager and meet on at least a quarterly basis.

Throughout the year, during regular and after-hours at various events, I meet or speak with many residents, property owners and business owners to listen and address matters of concern; sometimes it is a quick compliment or specific issue, other times it may relate to a policy matter or administrative procedure. I make every effort to respond to phone calls, emails, visits and letters in a timely fashion and/or delegate to the appropriate staff person with the same expectation. Over the past year, I received and responded to approximately 6,000 emails (a record high!) relating to issues before the Board or general community issues or questions, and public record requests. I will continue to remain accessible to the members of our community and strive to be responsive personally to inquiries in a timely manner – a directive I have made to staff as well.

Additionally, I worked to enhance multi-media approach to public information - Channel 18 cable show on the budget and ATM available on-line on demand, *YouTube* shows as well as *Chatham Today* programming highlights. *Budget Central* and *Town Meeting Central* enhancements to the Town's updated website gets us closer to 24/7 access to information, including links to the Town Manager's proposed Budget and Budget Book as promoted in the Town Manager's annual budget message

Board Support/Relations:

I have kept the BOS informed of major issues throughout the year including emergency situations, legislative updates, new initiatives and significant issues in our administration. This includes regular email notifications to inform the Board of various issues or concerns so that any member can respond to constituent inquiries, including but not limited to storm updates, roadway projects, public safety issues, as well as community events, development projects, and various issues that residents have brought to my attention. In addition to these communications, I have also provided or asked staff to provide numerous reports, information and updates to the Board at BOS meetings and in Executive Sessions, if necessary.

While I strive to effectively oversee and manage the daily operations and administration of town government, I do not hesitate to seek input from the Board. I meet regularly with the Chairman of the Board of Selectmen to review agendas, discuss policy issues for future agendas, as well as word on street. I have been and remain open to direction and guidance by the Board and I actively work to provide feedback and implement when feasible those suggestions provided. Communication with the Town Manager is integral to our partnership

and I appreciate your continued efforts. I am always available to meet with Board members and will continue to keep all similarly informed.

Final Thoughts:

Every Sunday evening, I take a moment to reflect on the previous week and to plan for the week ahead. It is always amazing for me to look back at the pace for which staff and I work on day-to-day matters in addition to established goals and items for/from weekly BOS meetings - and other Committee meetings. While I have worked to highlight accomplishments, I am very self-aware that challenges still exist in my role as Town Manager and I continually work to be as available and responsive as possible.

Our workforce is aging and while we work on succession planning many departments do not have a deep bench to call upon. Cape-based entrance into the public sector – professional or skilled positions is challenging coupled with market competition for Cape employees and cost of living. Two years ago, there was significant turn-over in the Finance Division and Community Development, and retirements in DPW which has since stabilized due to excellent hires – many from neighboring municipalities. As such, we can focus on grant opportunities, regional initiatives, and BOS policies/priorities to maintain a sense of community - more than in prior years. In our “small/rural” community as defined by the State due to its year-round population, staff is tackling issues that now persist year-round in recent years - coastal resiliency/storm preparation/response; public safety call volumes; maintenance of the Town’s infrastructure, facilities, streets; and basic core service requests and community initiatives. Staff is still experiencing a trickle up of workload demands, but we have experienced a better balance in 2018 than in the previous two years.

Our employees are very dedicated -whether its serving as staff to the many Town committees or call backs for emergency management to protect our citizenry – all welcomed in addition to day to day duties.

It is an honor to serve as Chatham’s Town Manager! I especially appreciate the open discussion by individual members of the Board of Selectmen for personal feedback throughout the year and via the formal evaluation process. I am always open to suggestions to serve you and the community better and I hope to continue to serve as your Town Manager for many years.

Thank you!